

# **Death of Beneficiary Form**

# Important information about this form:

- Use a Rollover Form to transfer assets from this Alabama ABLE account to another eligible Beneficiary.
- An IRS Form 1099-QA is filed when a withdrawal is made from the ABLE account.
- Please provide a <u>certified</u> copy of the Death Certificate and the <u>original</u> Certificate of Domicile and Letter of Testamentary for the Medallion Signature Guarantee.
- Please send in copies of the Death Certificate, Certificate of Domicile and Letter of Testamentary with this form.
- Type or print clearly in black ink, and do not staple the pages or copies
  of documents included with this form.

# Name of the Beneficiary on the ABLE account (First and last) Beneficiary's Social Security or Taxpayer Identification Number Alabama ABLE account number

# 2 Executor information

Name (Firs	t and las	t)			
/ Date of bir				_	
Social Sec	urity or	Taxpayer	Identific	ation Nu	mber

## Need help?

Give us a call Monday – Friday from 8am – 7pm CT at 1-833-711-2253

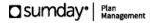
Individuals with speech or hearing disabilities may dial **711** to access Telecommunications Relay Service (TRS) from a telephone or TTY.

#### Mail the form to:

Alabama ABLE P.O. Box 9894 Providence, RI 02940-8094

## **Overnight Mail:**

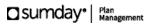
Alabama ABLE 4400 Computer Drive Westborough, MA 01581





# **Death of Beneficiary Form**

Street address 1	Street address 2			
City	State			
Choose the type of withdrawal				
A check made payable to the Beneficiary's estate (Please let us know where to mail the check to)				
Mail check to the Beneficiary's address on file	Э			
Mail check to the executor's address provide	d on this for	m		
Rollover to another eligible Beneficiary (Please fill out a <b>Rollover Form</b> for the plan you're transferring these assets to)				
Sign the form				
By signing below, I certify that all the information provide and correct. I authorize the Program to close this account				









# A Medallion Signature Guarantee is required for the death of a Beneficiary

Please provide a certified copy of the Death Certificate and the original Certificate of Domicile and Letter of Testamentary for the Medallion Signature Guarantee. When you mail in this form, please include copies of these documents.

### Keep in mind that:

- You're providing the following information as underwritten certification that your signature is genuine.
- You can get a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution. A notary public doesn't qualify, and you cannot guarantee your own signature. You may be required to provide proof of your authority to act on behalf of the ABLE account.
- Only sign if you are in the presence of an authorized officer providing the Medallion Signature Guarantee.

I certify that the information provided herein is true and complete in all respects, and that I have read and understand, consent, and agree to all the terms and conditions of the **Program Description & Participation Agreement**.

	Have the Authorized Officer stamp here
Signature of Executor	-
Signature Guarantor	-
Title	-
Name of Institution	-
Date (mm/dd/vyyy)	-

